OTT Subscription Management System (Salesforce CRM)

This document outlines the detailed plan for implementing the OTT Subscription Management System using Salesforce CRM, structured into ten distinct phases.

Phase 1: Project Initiation & Detailed Requirement Gathering

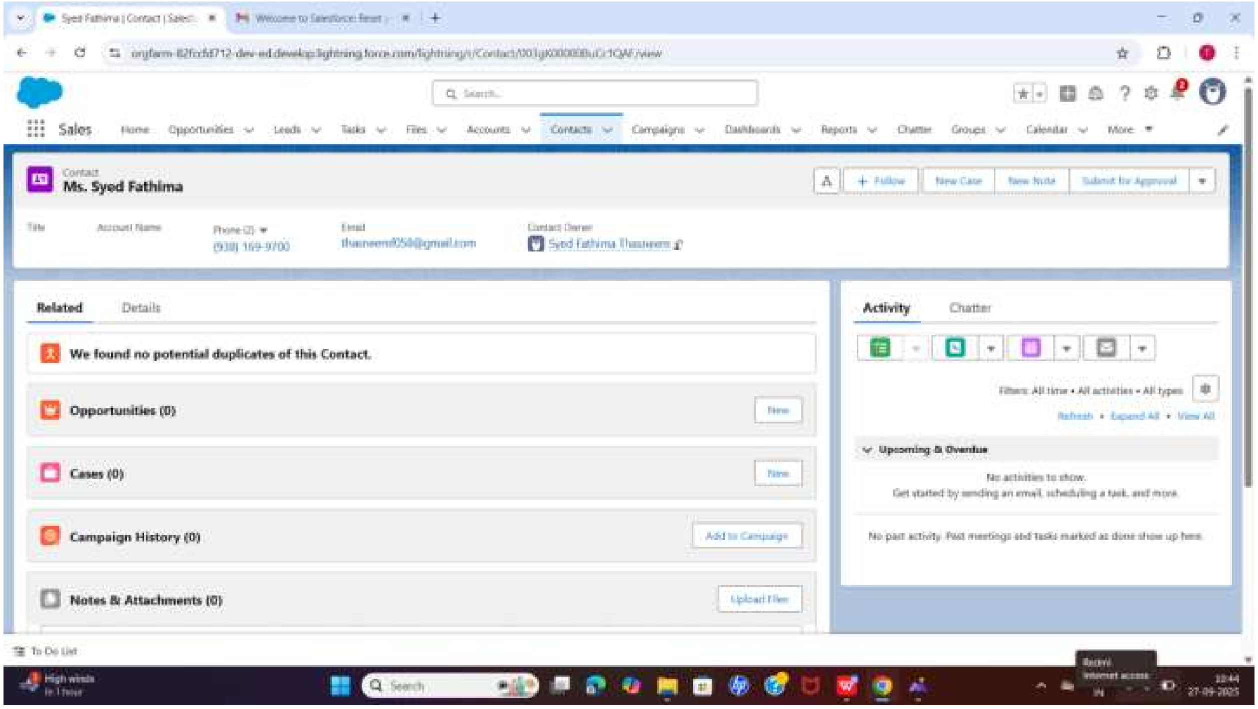
👉 **Goal:** Define the project scope, assemble the team, and collect granular requirements across all subscriber lifecycle stages (Acquisition, Service, Billing).

1. Conduct a project **Kick-off Meeting** to produce the **Signed Project Charter** (confirming scope, budget, timeline, and key stakeholders).
2. Run **Deep-dive Workshops** with stakeholders (Billing, Support, and Marketing teams) to create a **Detailed Requirements Document**.
3. Perform a **System Audit** to produce a **Current State Analysis** documenting existing systems (e.g., billing gateway, website) that require integration.

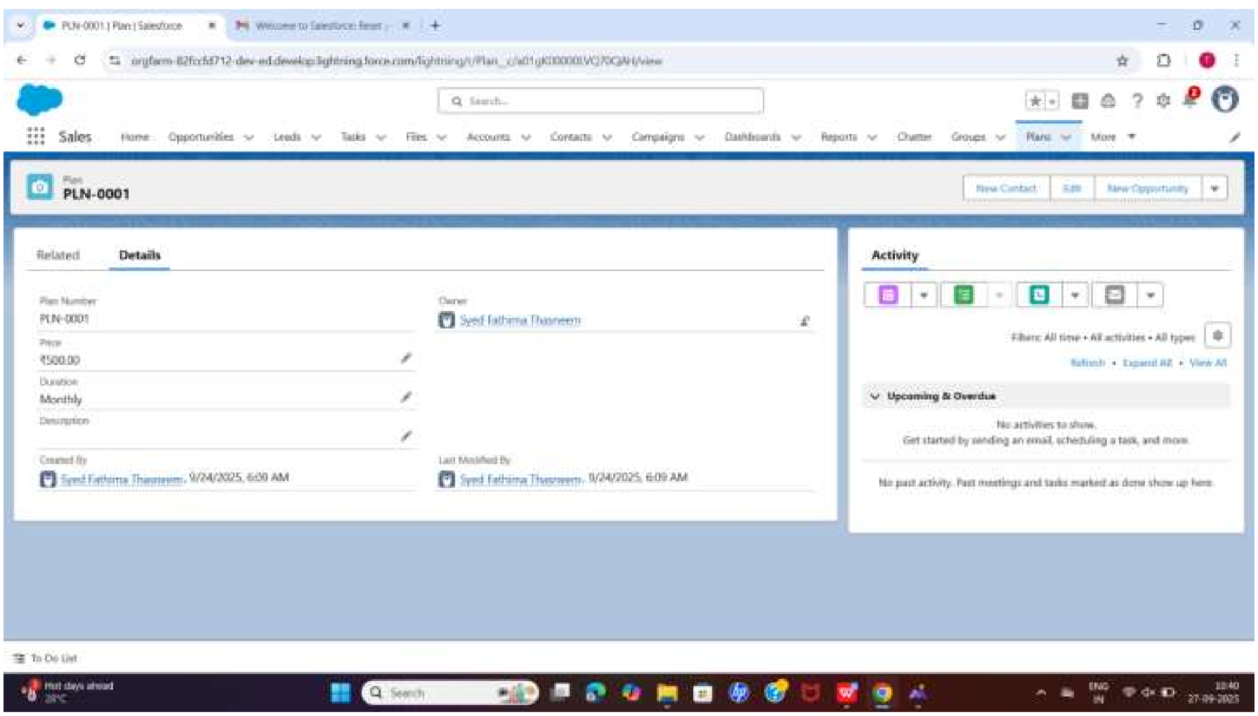
Phase 2: Data Model and Technical Design (Configuration Setup)

👉 **Goal:** Finalize the core data structure and design the overall system architecture by setting up the foundational objects and relationships.

1. **Objects Created and Configured:**
    - **Contact (Standard Object):** Stores customer details.

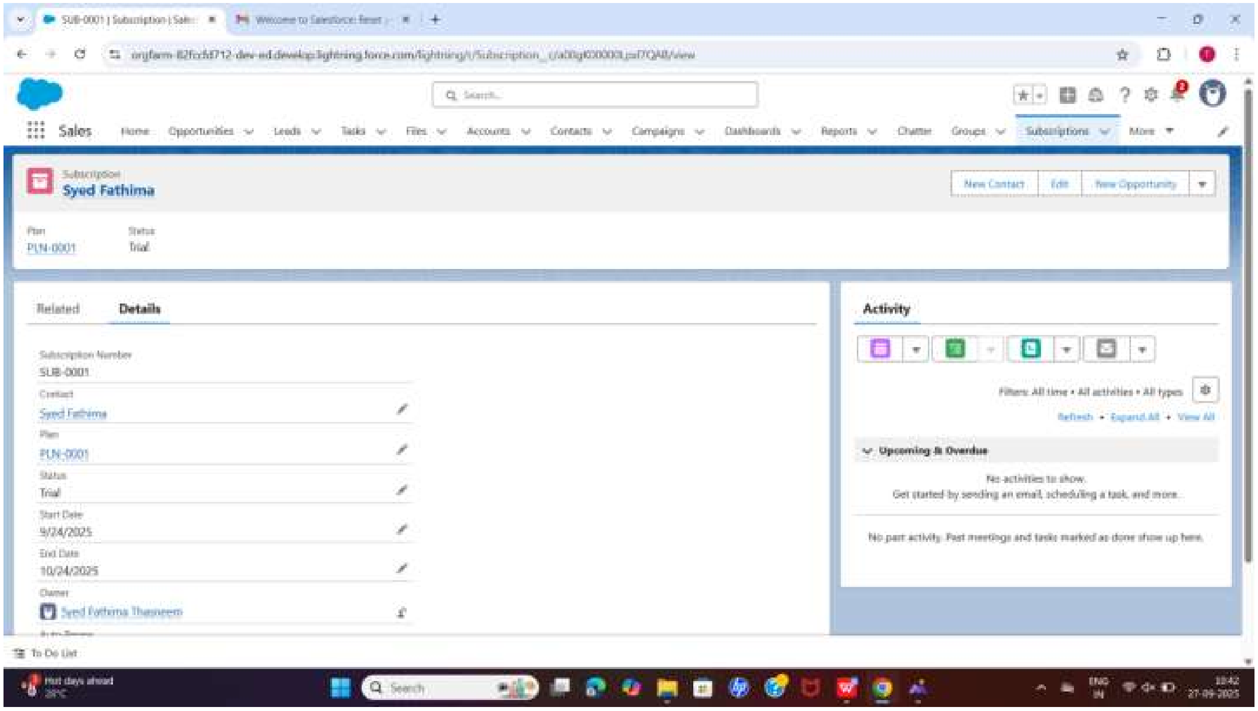


- Plan__c (Custom Object): Represents subscription plans available.
  - **Fields: Plan Number** (Auto Number), **Price** (Currency – INR), **Duration** (Picklist: Monthly, Quarterly, Yearly), **Description** (Text Area).

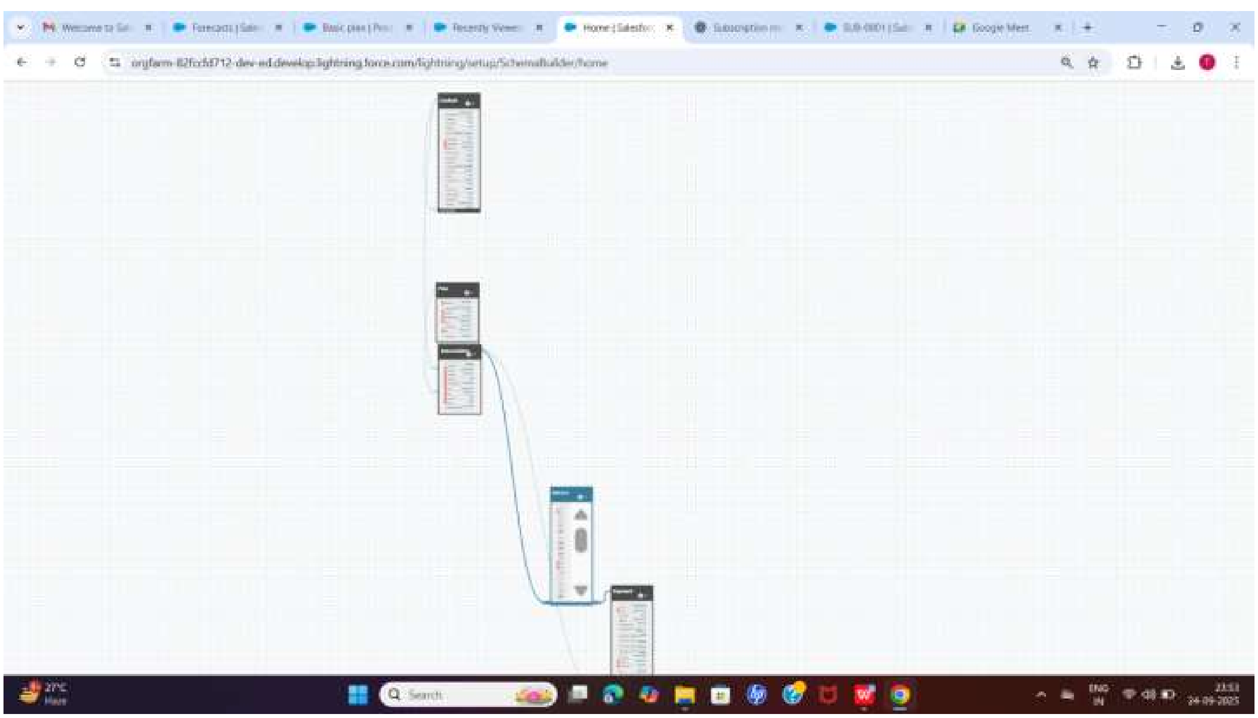


- **Subscription__c (Custom Object):** Connects a Contact with a Plan.
  - **Fields: Subscription Number** (Auto Number), **Contact** (Lookup → Contact), **Plan** (Lookup → Plan__c), **Status** (Picklist: Active, Inactive, Cancelled), **Start**

Date (Date), **End Date** (Date), **Owner** (Standard Owner field).

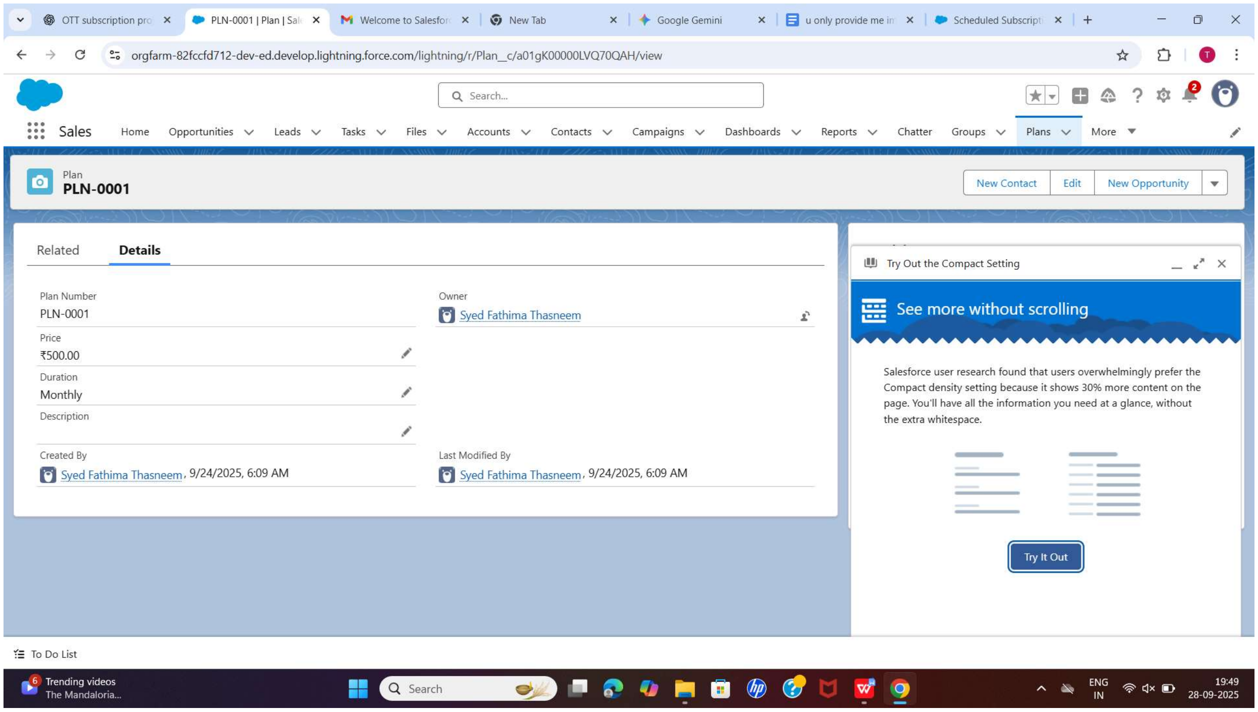


2. **Relationships Established:**
   - **Contact → Subscription:** Lookup relationship established.
   - **Plan → Subscription:** Lookup relationship established.



3. **Demo Records Created (Verification):**

- A **Contact Record** (Name: **Syed Fathima**) was created.
- A **Plan Record** (Name: **Premium Plan**, Number: **PLN-0001**, Price: **500 INR**, Duration: **Monthly**) was created.



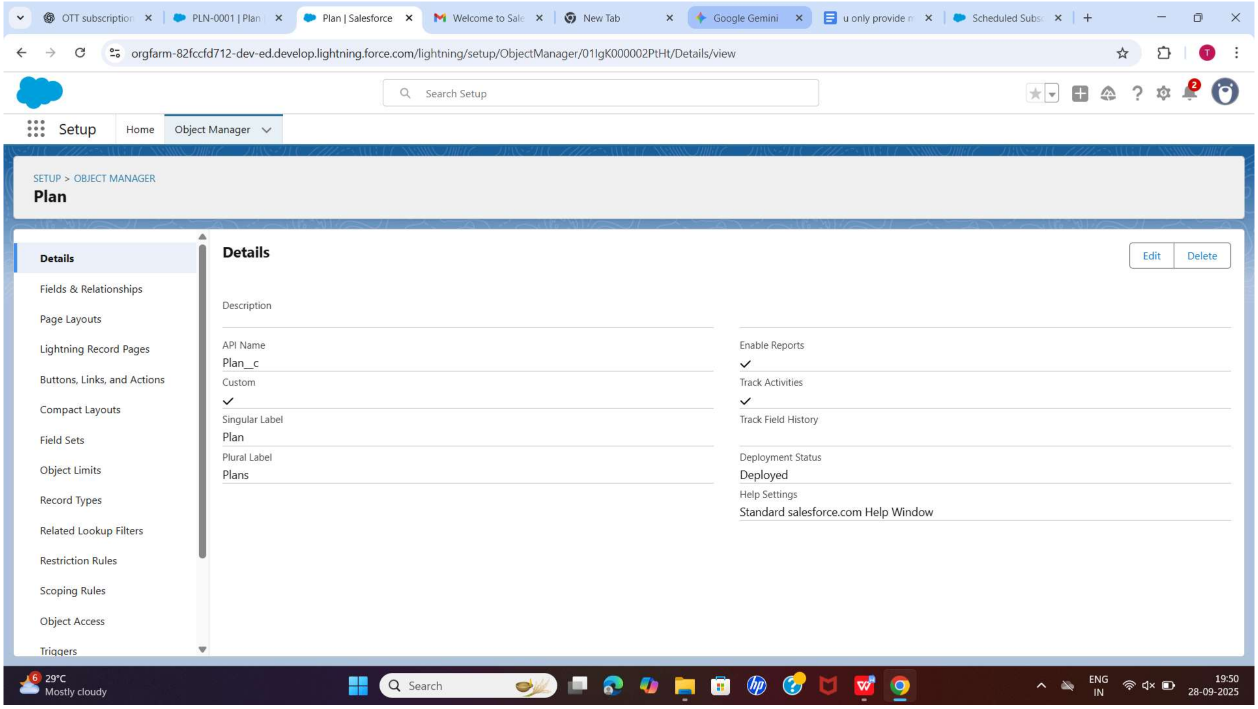
- A sample **Subscription Record** (**GEN-2004-001234**) was created and linked to the Contact and Plan, with Status **Active**.

4. **Functional Steps Completed:**
   - Created a Contact and a Plan (Product) in Salesforce.
   - Created a Subscription record linked to the Contact and Plan.
   - Verified the lookup relationships between Subscription ⟶ Contact and Subscription ⟶ Plan.
   - Confirmed the subscription is functional and saved correctly.
5. **Notes:** The initial setup for the core objects is complete, with **Price** entered in Indian Rupees (INR) and the configuration verified.

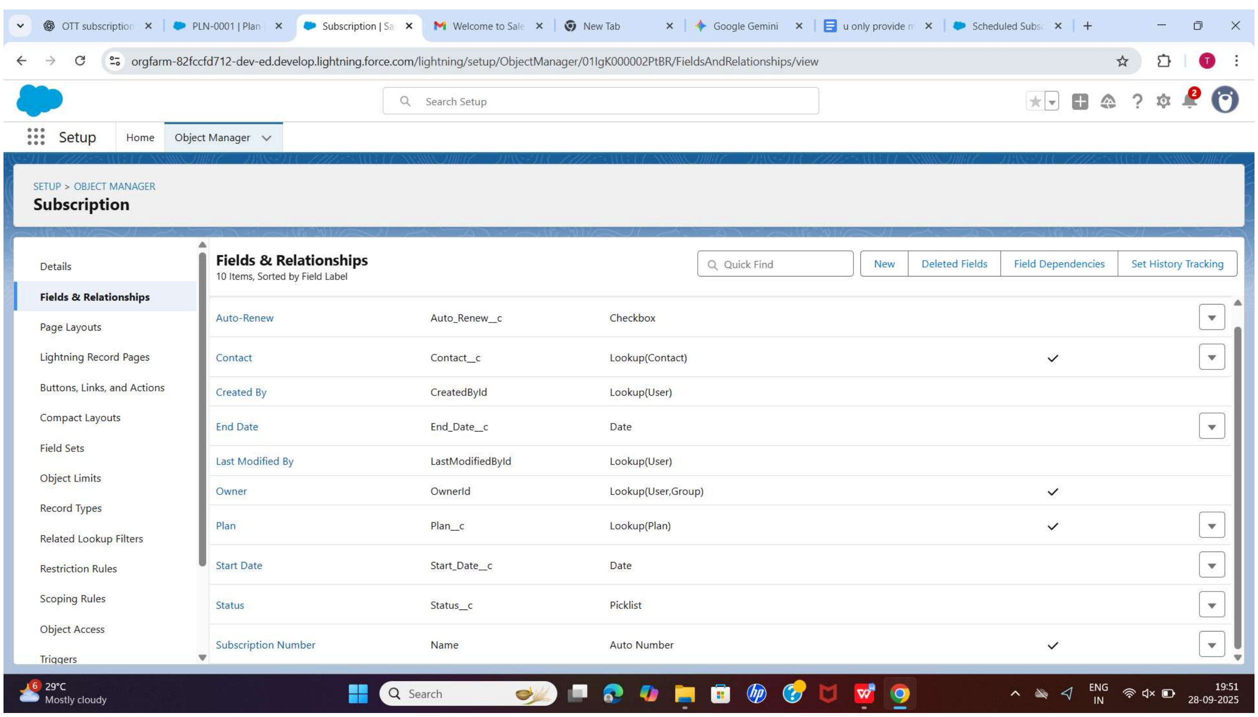
Phase 3: Data Modeling & Relationships (Billing Structure)

👉 **Goal:** Build the complete data structure in Salesforce, including transactional objects, and establish all necessary Master-Detail relationships for billing.

1. **Objects Created (Confirmed & Added):**
   - **Standard Object: Contact** (Subscriber).
   - **Custom Objects (Transactional): Subscription__c**, **Plan__c**, **Payment__c**, **Refund__c**.



2. **Fields Defined (Detailed):**
   - **Subscription__c: Subscription Number** (Auto Number), **Contact__c** (Lookup to Contact), **Plan__c** (Lookup to Plan), **Start Date** (Date), **End Date** (Date), **Status** (Picklist: Active, Cancelled, Paused, Expired), **Auto-Renew__c** (Checkbox).



   - **Plan__c: Plan Number** (Auto Number), **Name** (Text), **Price__c** (Currency, INR), **Duration__c** (Picklist: Monthly, Quarterly, Yearly), **Description__c** (Rich Text).

- **Payment__c: Payment Number** (Auto Number), **Amount** (Currency, INR), **Date** (Date/Time), **Status** (Picklist: Success, Failed, Pending, Refunded), **Subscription__c** (**Master-Detail**), **Total Refund Applied / Total Refund Unapplied** (Roll-Up Summary).
- **Refund__c: Refund Number** (Auto Number), **Amount** (Currency, INR), **Date** (Date/Time), **Status** (Picklist: Processed, Pending), **Payment__c** (**Master-Detail**), **Subscription__c** (Lookup, optional).

3. **Record Types:**
    - **Plan__c Record Types:** Created **Monthly Plan** and **Yearly Plan**.
4. **Page Layouts and Compact Layouts:**
    - **Subscription__c Layout:** Includes related lists for **Payments** and **Refunds**. Fields displayed: Contact, Plan, Status, Start Date, End Date, Auto-Renew.
    - **Subscription Compact Layout:** Set as Primary, displaying **Contact** (Subscriber), **Plan**, and **Status**.
5. **Relationships (Schema Confirmed):**
    - **Subscription__c** to **Contact__c** (Type: Lookup).
    - **Subscription__c** to **Plan__c** (Type: Lookup).
    - **Payment__c** to **Subscription__c** (Type: **Master-Detail**).
    - **Refund__c** to **Payment__c** (Type: **Master-Detail**).
6. **Schema Builder:** All objects (**Contact, Subscription__c, Plan__c, Payment__c, Refund__c**) and their relationships are visually confirmed.
7. **Status:** Phase 3 Complete: All objects, fields, record types, page layouts, compact layouts, and relationships have been created and verified.

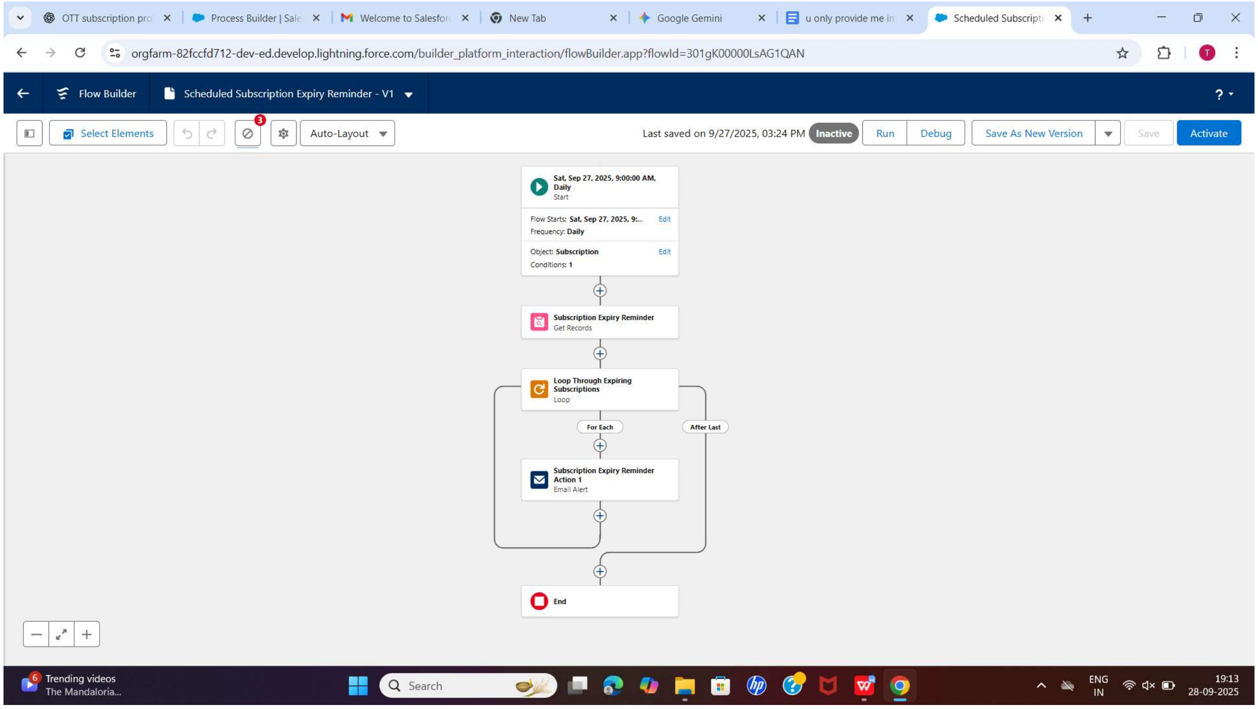
Phase 4: Sandbox Development (Configuration & Customization)

👉 **Goal:** Build all custom objects, fields, and automation in a dedicated development sandbox environment, and provide supporting evidence (screenshots).

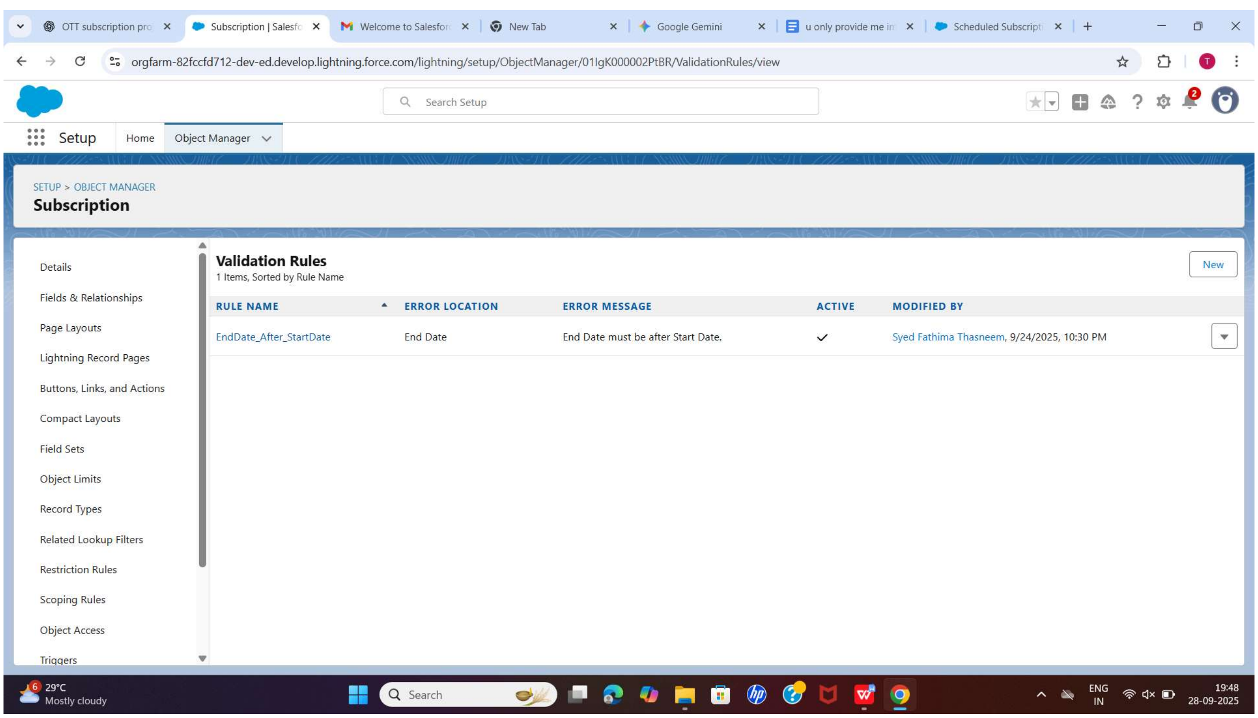
1. **Custom Object Creation Confirmation:**
    - All custom objects and fields from Phase 2 and 3 are deployed to the development sandbox.
    - **Evidence:** Screenshot of the Object Manager confirming the status of all custom objects.

[Image 01] (Screenshot of Custom Objects in Setup)

2. **Automation Builds (Flows & Rules):**
    - **Flow: Auto_Subscription_Creation (Record-Triggered Flow):** Automatically creates a new **Subscription__c** record when a new **Contact** is created and meeting specific criteria (e.g., Lead Source = 'Website Signup').



- **Flow: Payment_Status_Updater (Record-Triggered Flow):** Updates the **Subscription__c.Status** field based on the related **Payment__c** status (e.g., Payment Status 'Success' updates Subscription Status to 'Active').
- **Validation Rule: Valid_Refund_Amount (Payment__c):** Prevents a user from creating a **Refund__c** amount that exceeds the original **Payment__c.Amount** using a formula rule.



    - **Evidence:** Screenshots of the Flow Builder and the Validation Rule definition screen.

[Image 03] (Screenshot of the Valid_Refund_Amount Validation Rule on the Payment__c object)

3. **Service Console Setup & Quick Action:**
    - **App Setup:** Configured the Service Console app with the appropriate navigation items (Contacts, Subscriptions, Payments, Cases).
    - **Screen Flow:** Built and deployed the **Quick Action: Reset_Password** Screen Flow for support agents to use directly from the Contact record page.
    - **Evidence:** Screenshots of the configured Service Console app and the quick action in use on a record page.
4. **User Access Setup (Profiles):**
    - Created and configured the **Profile: OTT_Support_Agent** and **Profile: Content_Manager**.
    - Permissions configured to allow Support Agents Read/Edit/Create access to **Subscription__c** and **Payment__c**, while Content Managers have Read-Only access to financial objects.
    - **Evidence:** Screenshot of the Profile definition page showing object access for **OTT_Support_Agent**.

[Image 06] (Screenshot of Profile Settings for OTT_Support_Agent)

Phase 5: Data Migration Planning and Strategy

👉 **Goal:** Develop a strategy to safely extract, transform, and load existing subscriber data into the new Salesforce objects.

1. Conduct **Data Cleansing** on legacy data to produce a clean data set (fixing duplicates or missing required fields).
2. Finalize the **Mapping Document** to map legacy subscriber data fields to **Contact**, **Account**, and **Subscription__c** fields in Salesforce.
3. Prepare the **Migration Script/Tool** (e.g., Data Loader or custom Apex) ensuring the load sequence correctly creates parent records (Contact) before child records (**Subscription__c**).

Phase 6: Quality Assurance & System Integration Testing (SIT)

👉 **Goal:** Verify that all configured components work together as designed and integrate correctly with external systems.

1. Perform **Functional Testing** using test scripts to verify all internal flows (e.g., **Process: Handle_Successful_Payment**) execute correctly.

2. Conduct **Integration Testing** to validate two-way communication between Salesforce and the external Billing Gateway.
3. Complete **Security Testing** to ensure Field-Level Security (FLS) and sharing rules are properly enforced for the **Profile: OTT_Support_Agent** and all other user roles.

Phase 7: User Acceptance Testing (UAT) & Training

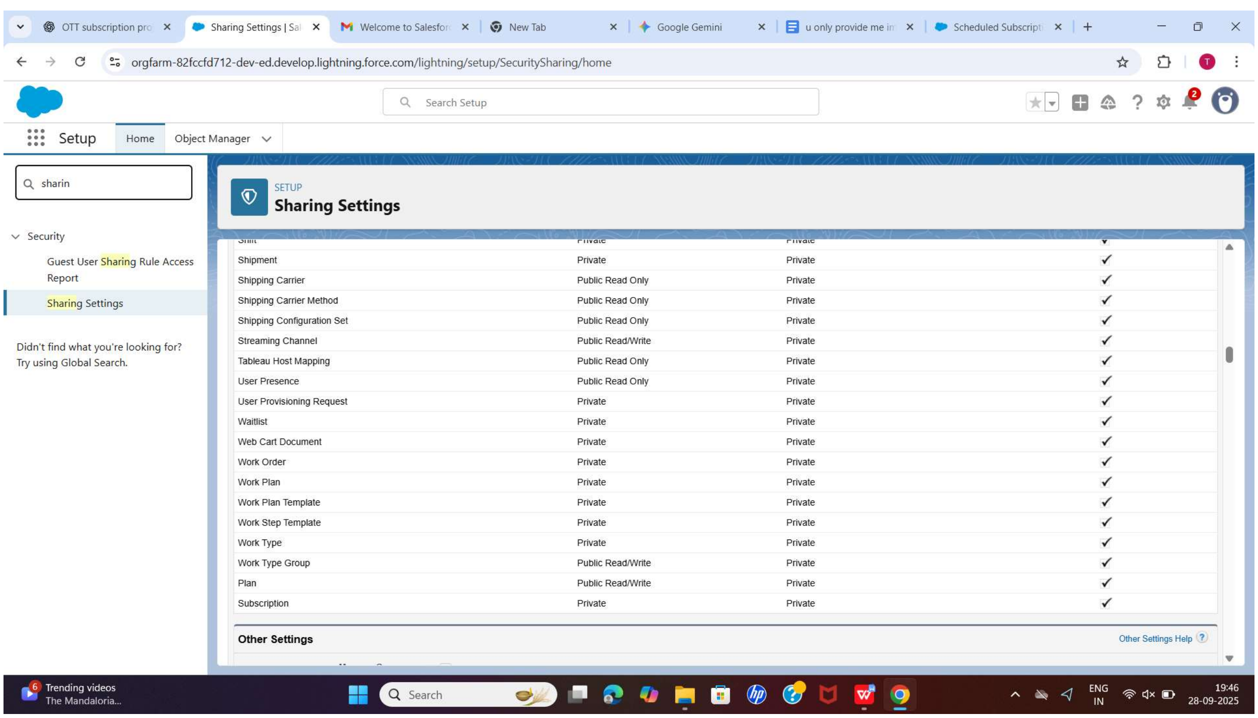
👉 **Goal:** Ensure the system meets end-users' needs and prepare users for the new platform.

1. Execute **UAT** with key users (Support Agents, Managers) testing the entire subscriber lifecycle, including Case management and the **Quick Action: Reset_Password** flow. Obtain the **UAT Sign-off Document**.
2. Develop **Training Material** including user guides and videos that covers standard operating procedures (SOPs).
3. Conduct **End-User Training** sessions using realistic scenarios to prepare the team for the Go-Live.

Phase 8: Deployment & Go-Live

👉 **Goal:** Migrate the validated configuration and data to the Production environment and launch the system.

1. Complete the **Pre-Deployment Checklist**, including a final audit of all OWD settings (e.g., **Subscription__c Sharing** must be **Private**).



2. Execute **Configuration Deployment** using Change Sets or a DevOps tool to move all Metadata (Flows, Objects, Profiles) to Production.

3. Perform **Final Data Migration** by executing the production data load scripts for all key objects.
4. Conduct **Go-Live Activation** and system cutover, switching users from the legacy system to the new Salesforce CRM.

Phase 9: Post-Go-Live Support & Handover

👉 **Goal:** Provide intensive support immediately following deployment and formally transition ownership to the internal admin team.

1. Provide **Hypercare Support** for the first few weeks post-launch, prioritizing and resolving critical bugs captured in the **Issue Log**.
2. Conduct **Knowledge Transfer** sessions and provide comprehensive Admin Documentation to the internal Salesforce Administrator.
3. Monitor **Adoption Monitoring** reports (User Login/Activity) to track usage and identify teams needing additional support.

Phase 10: Performance Review & Optimization

👉 **Goal:** Review key project metrics, validate business value, and plan for future enhancements.

1. Execute **Reporting Validation** to ensure data accuracy in key dashboards, such as the **Report: MRR_by_Plan_Type** and the **Report: Churned_Subscribers_Analysis**.
2. Conduct a **Value Assessment** to produce a **Project Success Report**, comparing post-launch KPIs (e.g., Case resolution time) against baseline metrics.
3. Develop the **Optimization Planning** (Phase 2 Roadmap) gathering feedback for future work, such as leveraging **Content_Interest__c** data for personalized marketing.